

INTERNATIONAL EGG AND POULTRY REVIEW

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U.S. Department of Agriculture Agricultural Marketing Service **Poultry Programs** Market News Branch Korea

U.S. Poultry Outlook

Second quarter 2002 broiler exports totaled 1.12 billion pounds, down 20 percent from the same period in 2001. The chief reason for the decline in shipments was the trade disagreement with Russia. While exports to Russia have been almost 30 percent lower over the first 6 months of 2002, the 169 million pounds reportedly shipped during June were considerably higher than in the previous 2 months. While lower broiler exports to Russia is the major factor in the decline in total broiler shipments, exports have also been lower to a number of other major markets, such as Hong Kong/China and Japan. The only major markets with increased exports over the first half of 2002 have been Mexico and Korea.

The forecast for broiler exports during the second half of 2002 calls for gradually increasing shipments compared with secondquarter 2002. However, exports will still be considerably lower than the previous year. The forecast for total exports in the third and fourth quarters is 2.5 billion pounds, down 7 percent from the previous year. Along with improvement in the Russian market, this forecast is dependent on gains in exports to such markets as Hong Kong/China and Japan.

Poultry Forecasts, Annual U.S. Trade in million pounds

	2001	2002	2003
Broiler Production	31,266	32,304	33,000
Turkey Production	5,562	5,658	5,675
Table Egg Production*	6,074	6,125	6,110
Broiler Exports	5,557	4,868	5,450
Turkey Exports	487	496	490

^{*}in million dozens

Source: Economic Research Service, USDA

Japanese Frozen Egg Imports, in metric tons

	Frozen	Frozen	Frozen	
2001	Whole Eggs	Yolk	Albumen	Total
April	172.4	1,073.5	204.6	1,450.5
May	175.6	1,123.3	209.2	1,508.1
June	166.7	1,053.5	117.6	1,337.8
2001 To-Date	1,137.4	6,115.5	1,436.4	8,689.3
2002				
April	221.1	1,379.6	54.4	1,655.1
May	262.8	1,366.7	-	1,629.5
June	247.8	901.4	18.1	1,167.3
2002 To-Date	1,431.1	5,331.4	320.1	7,082.6

Source: ALIC Monthly Statistics

Korea's market for imported chicken is dominated by the U.S. In 2001, the U.S. market share of chicken meat imports was 60 percent by volume. Chicken meat imports totaled 50,024 MT for the first six months of 2002 compared to 83,375 mt for Jan-Dec 2001. Imports

competitive.

Korea - Chicken Meat Imports in metric tons

have been strong as import prices of chicken cuts remain very

	U.S	Thailand	China
CY 2001	48,872	30,095	3,657
Jan-Jun 2002	35,314	13,735	280

According to traders, price is the key factor in their business decisions regardless of origin. However, the extent of processing also is important. While chicken legs from Thailand are 50 percent more expensive than U.S. chicken legs, extra processing make the Thai legs a viable option for Korean importers. Korean importers claim Thai cuts are clean and have uniform quality and thus no labor is needed prior to supplying Korean end users. In contrast, Korean importers say U.S. chicken legs need additional trimming, which generates additional cost for importers. As a result, traders always take labor costs and import prices into consideration when deciding whether to buy U.S. or Thai chicken legs.

China has not been able to recapture its market share since the outbreaks of High Pathogenic Avian Influenza in 1997 and 2001. Korean importers are rather reluctant to risk importing Chinese chicken due to sanitary problems from time to time. Also, the Chinese government finds the Korean market less attractive due to rigorous import quarantine inspection.

Source: USDA/FAS

U.S. Poultry Meat in Exports, in metric tons

July

January - July

	January Jary		ou.y		
	2001	2002	2001	2002	
Russia	611,474.6	437,893.5	91,069.0	64,397.5	
Hong Kong	214,092.0	200,679.2	23,712.0	23,047.6	
Mexico	151,016.3	151,586.7	18,345.9	13,288.7	
Korea	60,768.1	76,829.1	10,332.1	6,649.4	
Canada	64,979.5	72,716.7	9,780.9	12,029.9	
China	35,275.8	39,790.2	5,143.7	5,473.3	
Poland	44,818.2	36,834.5	8,573.3	11,046.0	
Turkey	11,065.4	30,618.8	4,216.2	8,107.1	
Japan	70,545.9	30,524.1	11,426.3	6,585.4	
Angola	22,453.4	26,913.4	1,720.2	7,564.8	
World	1,657,789.1	1425,436.5	226,455.4	206,498.6	

Source: Department of Commerce, U.S. Census Bureau, Foreign

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Inspected Egg Products-U.S. & Canada Export/Import Trade					LIVE POULTRY SLTRD UNDER INSPECTION W/E 14-Sep-02			
U.S. Exports t					(PRELIMINARY) U.S	. FOWL SLAUGI	HTERED DOM	ESTICALLY
Week Ending	September 14			ear-To-Date	, ,	LIGHT	HEAVY	TOTAL
	2002	2001 /1	2002	2001		HENS	HENS	HENS
Liquid	456	231	18,542	8,249		ТІ	HOUSANDS-	
Frozen	0	0	21	78	HEAD	1,622	1,672	3,294
Dried	91	0	655	40	LAST WEEK	1,156	1,084	2,240
Total	547	231	19,218	8,367	SAME WEEK YR AGO	1,847	1,523	3,370
U.S. Imports F	rom Canada.				TO-DATE/2002	64,668		115,902
Week Ending				ear-To-Date	TO-DATE/2001	65,336		116,375
g	2002	2001/1	2002	2001	U.S. FOWL SLAUGHTER	•		110,575
Liquid	164	131	4,701	3,868	0.0. I OWE SEASSITIEN	LIGHT	HEAVY	TOTAL
Frozen	17	70	2,487	1,073		HENS	HENS	_
Dried	160	12	3,828	485		_	_	HENS
Total	341						IOUSANDS—	400
		213	11,016	5,426	HEAD	410	13	423
Inspected She					LAST WEEK	257	8	265
U.S Exports T					SAME WEEK YR AGO	234	0	234
Week Ending	•			ear-To-Date	TO-DATE/2002	11,434	244	11,678
	2002	2001 /1	2002	2001	TO-DATE/2001	16,298	240	16,538
Jumbo	33	0	1,546	87	SOURCE: AGRICULTUR	RE CANADA, PL	TRY DEVELO	PMENT DIV.
Extra Large	1,230	3,123	25,183	48,812	TOTAL U.S. FOWL SLAU			
Large	2,825	2,318	92,283	90,552		LIGHT	HEAVY	TOTAL
Medium	1,230	0	35,933	33,868		HENS	HENS	HENS
Ungraded	19,230	14,880	223,375	280,250		_	IOUSANDS—	
Misc	0	900	13,692	67,220	HEAD	2,032	1,685	3,717
Total	24,548	21,221	392,012	520,789	LAST WEEK	1,413	1,003	2,505
/1 Comparable	•	•	•					
rounding.	s week, to-da	te figures fria	y not total de	16 10	SAME WEEK YR AGO	2,081	1,523	3,604
Source: USDA	/AMS Doultry	Drograma M	arkat Nawa I	Oranah in	TO-DATE/2002	76,102		127,580
					TO-DATE/2001	81,634		132,913
cooperation w Division.	ith Agriculture	Canada, Pol	uitry Develop	oment	SOURCE: USDA/AMS P	LIRY PROGRA	MS, MRKT NE	WS BR.
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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 20 SEPTEMBER 2002.

Trade sentiment was steady to barely steady on fresh tom breast meat, at least steady on fresh destrapped tenderloins, and steady to fully steady on fresh wing meat. Fresh tom breast meat demand was light to fair with some noting buyer interest continuing to slow when compared to previous weeks. Demand was fair on fresh destrapped tenderloins and fair to good on fresh wing meat. Offerings of fresh tom breast meat were adequate to fully adequate, light on the balance of fresh white meat. Frozen white meat undertone was fully steady on scapula, balance steady to barely steady. Frozen demand ranged light to instances fair with isolated improved interest noted on wing meat. Offerings of scapula tight, balance mixed. The undertone on 4-8 lb. breasts was steady with increased confidence noted, institutional breasts steady to fully steady. Demand ranged light to instances good for the generally adequate offerings. Domestic trading centered on a heavy volume of Grade A 4-8 lb. breasts for mostly October shipments, balance light. Export trading centered on moderate volumes of thigh meat and drums. Non-basted breasts: Grade A 12-16 lb. 102, plant grade 12-16 lb. 92, plant grade basted 20-24 lb. breasts 102 cents delivered domestic. Fresh thigh meat 55, hen 2-joint wings 57 cents delivered export.

FRIDAY, SEPTEMBER 20, 2002 EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME	WEEKLY WTD AVG	WEEKLY VOLUME
	RANGE	CODE 1/	PRICE	(000)	PRICE	(000)
DRUMSTICKS, TOMS	19.00-20.00		19.72	516	20.03	884
WINGS FULL-CUT - TOMS		R	22.00	208	22.00	208
WINGS, V-TYPE, TOM		R	26.00	104	26.00	104
TAILS	15.00		15.00	240	15.66	1,948
MECHANICALLY SEPARATED 2/	19.50		19.50	40	19.71	470
THIGH MEAT - FROZEN	51.00-55.00		53.00	640	51.86	1,102
THURSDAY SEPTEMBER 19, 2002						
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS	19.25		19.25	104		
WINGS FULL-CUT - TOMS	22.00		22.00	208		
WINGS, V-TYPE, TOM	26.00		26.00	104		
TAILS	14.00-19.00		14.83	1,080		
MECHANICALLY SEPARATED 2/	19.50-20.00		19.63	150		
THIGH MEAT - FROZEN	53.00-56.00		53.60	50		
WEDNESDAY, SEPTEMBER 18, 200)2					
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS	20.00-22.00		20.94	264		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS	15.00		15.00	260		
MECHANICALLY SEPARATED 2/	19.00-19.50		19.17	120		
THIGH MEAT - FROZEN	48.00-53.00		50.00	200		
TUESDAY, SEPTEMBER 17, 2002						
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS		F	19.49	408		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		T	24.83	156		
TAILS		M	19.00	368		
MECHANICALLY SEPARATED 2/	19.00		19.00	80		
THIGH MEAT - FROZEN	49.00		49.00	52		
MONDAY, SEPTEMBER 16, 2002						
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS		F	19.49	408		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		Т	24.83	156		
TAILS	19.00		19.00	368		
MECHANICALLY SEPARATED 2/	21.50		21.50	80		
THIGH MEAT - FROZEN	50.00		50.00	160		
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1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY 2/ Product contains 15-20% fat with skin added.

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